# CSBG Annual Reporting

## MOST COMMON REPORTING MISTAKES

December 15, 2020

# IN THIS PRESENTATION

## TOPICS COVERED TODAY

- Identify frequent reporting mistakes seen during fourth-quarter reporting.
- Reporting Reminders
- Reporting Checklist
- Questions

ISSUES

# Programmatic

- Agencies are reporting program service totals instead of the total number of people who received the service. For example, if an agency prepares meals, report on the number of people who received those meals, not the prepared meals.
- Duplication of people served in each quarter on the progress page. For example, if an agency list 125 Head Start children in each quarter, this creates duplication. The 125 children must be entered in the first quarter, and zero to very little should be reported in other quarters.
- Family National Performance Indicator (FNPI) tab - Column 1 (the number of participants served) is less than column 3 (actual results). The number of people in the program should almost always be higher than the number of people achieving the outcome.
- Outcome 7a should be higher than or equal to the highest number of people in an outcome category. 7a is the number of people achieving **one OR more** outcomes.
- ROMA Implementer Progress plan was incomplete.

## All Characteristics Report- Demographics

- The total number of households or individuals served does not equal the total number of unduplicated people served.
- High numbers of unknown individuals served were reported. Attempt to collect as much information about clients as you can; if you cannot gather the data, report the number in the people served but didn't collect demographics section in the demographic form.
- Military status, work status, and health are not totaling the number of individuals served. Work Status and Military Status should only add up to individuals age 18+
- The total number of children in Head Start is lower than that number of children on demographics form.

# Financial

## CSBG Expenditures

- The Agency Capacity Building on activities funded by CSBG checklist were incomplete.

- The CSBG expenditure total for July 1 through June 30 should be shown under this tab. You can confirm the total by looking at the total expended shown on your June invoice under the “Expenses” tab which is located within the “Financials” tab located in CSBG Reporter.

## CSBG Resources

- The CSBG allocation as shown in your contract should be inserted under “Fiscal 20__ Allotment”, not your expenditures. The TANF allocation shown in your contract should be inserted under “Federal Resources Allocated (Other than CSBG)”.

## CSBG Capacity Building

- Agencies did not include partnerships- every agency should have 1 statewide organization and 1 state government agency listed.
- Volunteer hours of agency capacity building- agencies were reporting similar numbers for the total number of volunteer hours donated to the agency, and of the total number of volunteer hours donated by individuals with low-incomes.

Reminder

# Services vs. Outcomes

**Services (outputs):** are the activities of the program- both the activities of the provider (the CAA or partners) and the activities of the participant.

**Outcomes (results)**: are the changes observed or reported after participation in a service or activity.

If you cannot identify what has changed, then the item is probably an output, not an outcome.

# How to Report Individual and Family Indicators

For all FNPIs, data is entered in columns I-III; columns IV and V will auto-calculate. The percentage achieving the outcome is reflected in column IV. Column V measures the accuracy of the CSBG Eligible Entity's targeting.

| Domain | I. Number of Participants Served in program (s) (#) | II.) Target (#) | III.) Actual Results (#) | IV.) Percentage Achieving Outcome [III/I=IV] (% auto calculated) | V.) Performance Target Accuracy (III/II=V] (% auto calculated) |
|---|---|---|---|---|---|

1. Column I, the **Number of Participants Served**, reports the unduplicated number of participants who received services in programs that were part of the CSBG Eligible Entity's efforts to achieve the outcome that would be reported in an associated indicator.

2. Column II, the **Target**, reports the **number** of participants who were **expected to achieve the identified outcome.** This can be find in your Community Action Plan, grants, or contracts of funding sources that supports the efforts or is identified through CSBG Eligible Entity's ROMA process.

3. Column III, the **Actual Results**, reports the **number** of participants in column III (above) who **achieved the identified outcome** within the reporting period. This number must be based on verification that an outcome has been achieved and must be supported by appropriate documentation.

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# How to Report Individual and Family Indicators

4. Column 4, Percentage Achieving an Outcome, indicates the **proportion of program participants who achieved an outcome** (III) divided by the total number of participants served (I). The provided forms will automatically calculate the actual outcome achieved. (III/I=IV).

5. Column 5, Performance Target Accuracy, measures the **accuracy of planned anticipated outcomes.** The Actual Result (III) is divided by the Target (III). The provided forms will automatically calculate this success rate of performance (III/II=V).

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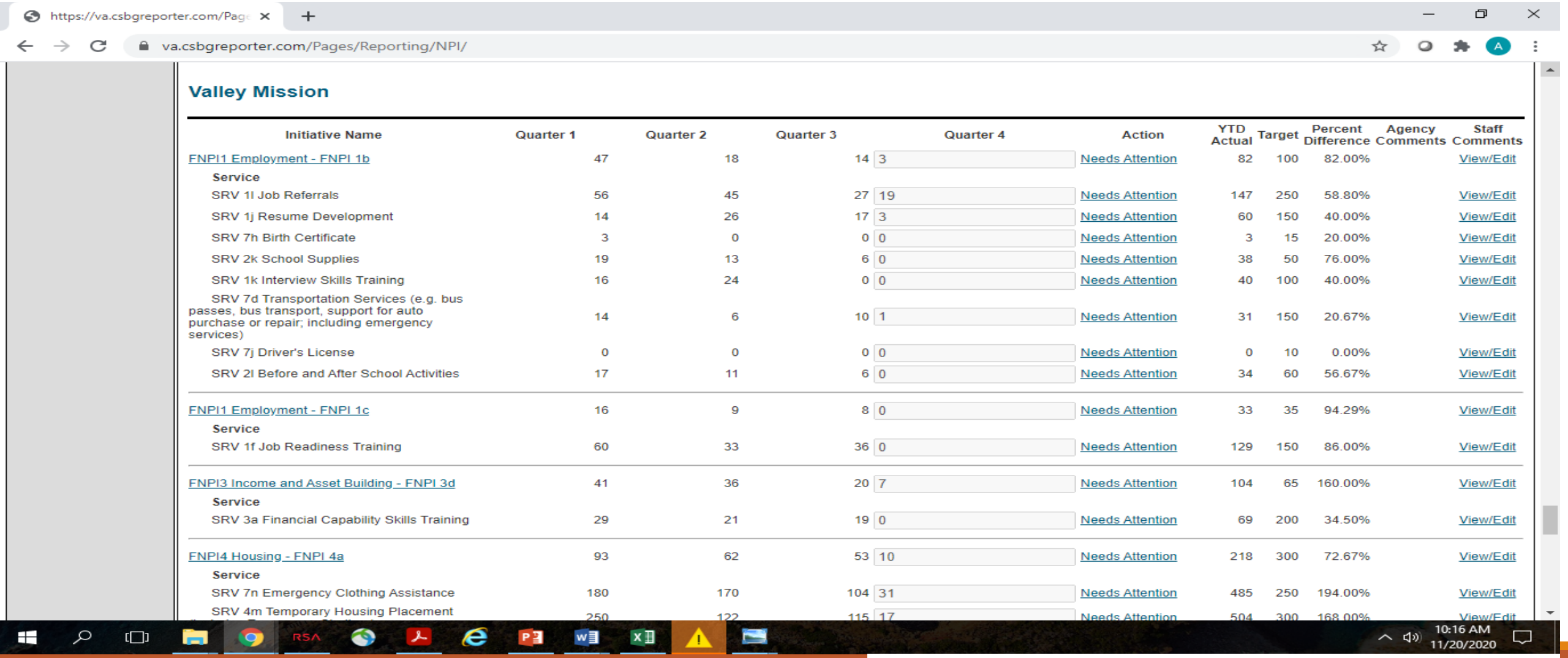
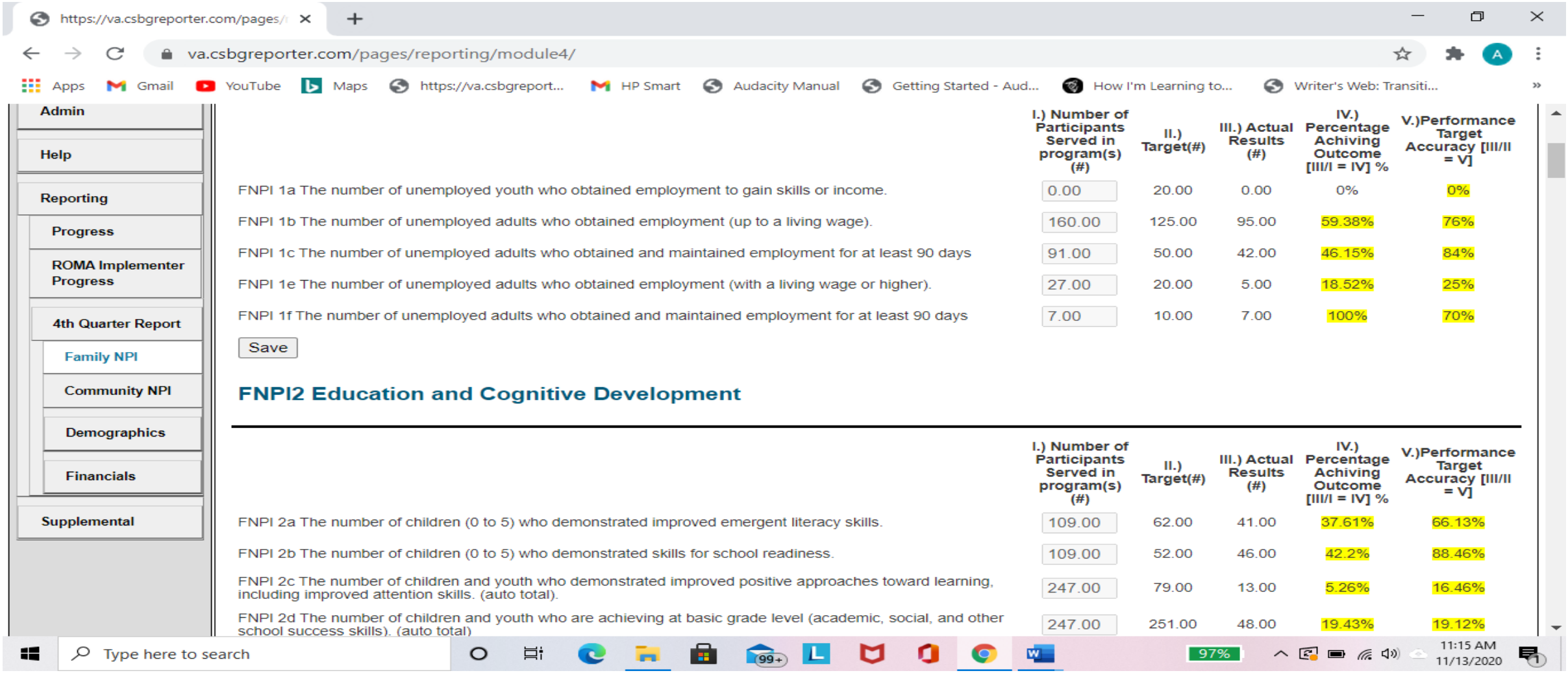
# CSBG Progress Report




## Valley Mission

| Initiative Name | Quarter 1 | Quarter 2 | Quarter 3 | Quarter 4 | Action | YTD Actual | Target | Percent Difference | Agency Comments | Staff Comments |
|---|---|---|---|---|---|---|---|---|---|---|
| FNPI1 Employment - FNPI 1b | 47 | 18 | 14 | 3 | Needs Attention | 82 | 100 | 82.00% | | View/Edit |
| **Service** | | | | | | | | | | |
| SRV 1l Job Referrals | 56 | 45 | 27 | 19 | Needs Attention | 147 | 250 | 58.80% | | View/Edit |
| SRV 1j Resume Development | 14 | 26 | 17 | 3 | Needs Attention | 60 | 150 | 40.00% | | View/Edit |
| SRV 7h Birth Certificate | 3 | 0 | 0 | 0 | Needs Attention | 3 | 15 | 20.00% | | View/Edit |
| SRV 2k School Supplies | 19 | 13 | 6 | 0 | Needs Attention | 38 | 50 | 76.00% | | View/Edit |
| SRV 1k Interview Skills Training | 16 | 24 | 0 | 0 | Needs Attention | 40 | 100 | 40.00% | | View/Edit |
| SRV 7d Transportation Services (e.g. bus passes, bus transport, support for auto purchase or repair; including emergency services) | 14 | 6 | 10 | 1 | Needs Attention | 31 | 150 | 20.67% | | View/Edit |
| SRV 7j Driver's License | 0 | 0 | 0 | 0 | Needs Attention | 0 | 10 | 0.00% | | View/Edit |
| SRV 2l Before and After School Activities | 17 | 11 | 6 | 0 | Needs Attention | 34 | 60 | 56.67% | | View/Edit |
| FNPI1 Employment - FNPI 1c | 16 | 9 | 8 | 0 | Needs Attention | 33 | 35 | 94.29% | | View/Edit |
| **Service** | | | | | | | | | | |
| SRV 1f Job Readiness Training | 60 | 33 | 36 | 0 | Needs Attention | 129 | 150 | 86.00% | | View/Edit |
| FNPI3 Income and Asset Building - FNPI 3d | 41 | 36 | 20 | 7 | Needs Attention | 104 | 65 | 160.00% | | View/Edit |
| **Service** | | | | | | | | | | |
| SRV 3a Financial Capability Skills Training | 29 | 21 | 19 | 0 | Needs Attention | 69 | 200 | 34.50% | | View/Edit |
| FNPI4 Housing - FNPI 4a | 93 | 62 | 53 | 10 | Needs Attention | 218 | 300 | 72.67% | | View/Edit |
| **Service** | | | | | | | | | | |
| SRV 7n Emergency Clothing Assistance | 180 | 170 | 104 | 31 | Needs Attention | 485 | 250 | 194.00% | | View/Edit |
| SRV 4m Temporary Housing Placement | 250 | 122 | 115 | 17 | Needs Attention | 504 | 300 | 168.00% | | View/Edit |

# CSBG Reporter



# FNPI 7 Outcomes across Multiple Domains

Outcomes across Multiple Domains indicators collect data on the unduplicated number of individuals who achieve **one or more** of the outcomes reported throughout **any** of the domains as a result of a CSBG Eligible Entity.

For instance;

1. An individual who obtained employment (FNPI 1b) and a certificate or diploma (FNPI 2g) may be reported **in each of those indicators and reported here once**.

2. An individual who obtained **only one outcome may be reported in that indicator and also be reported here once**.

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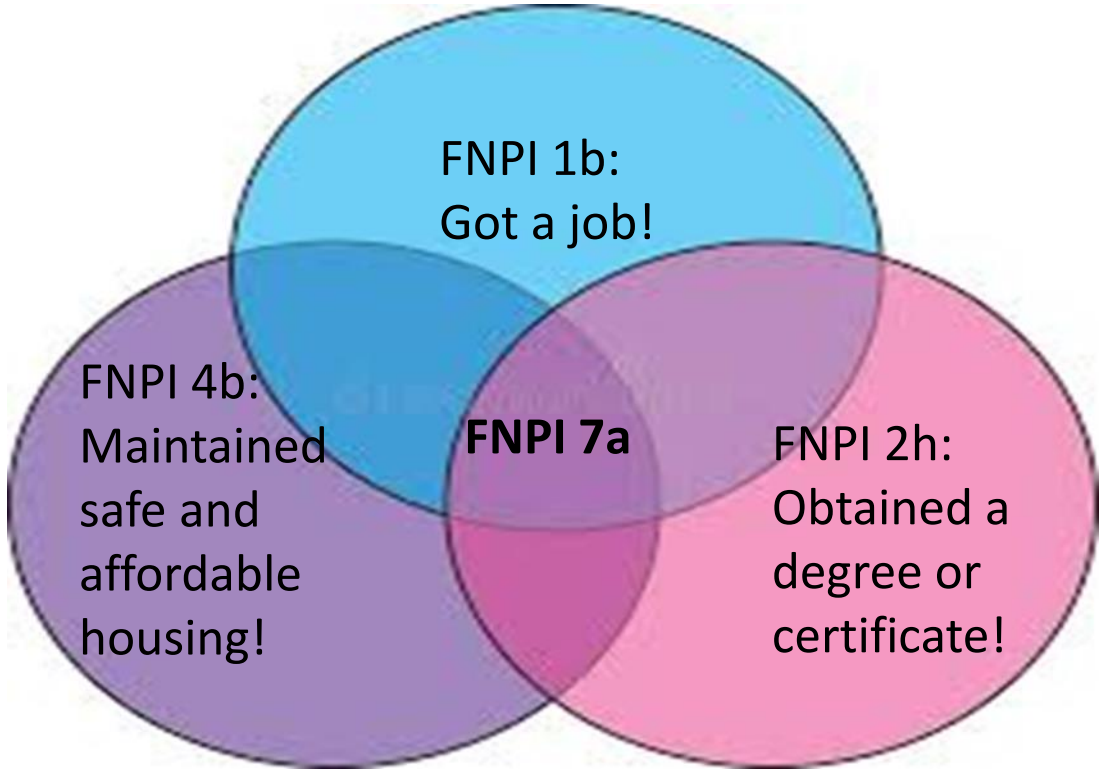
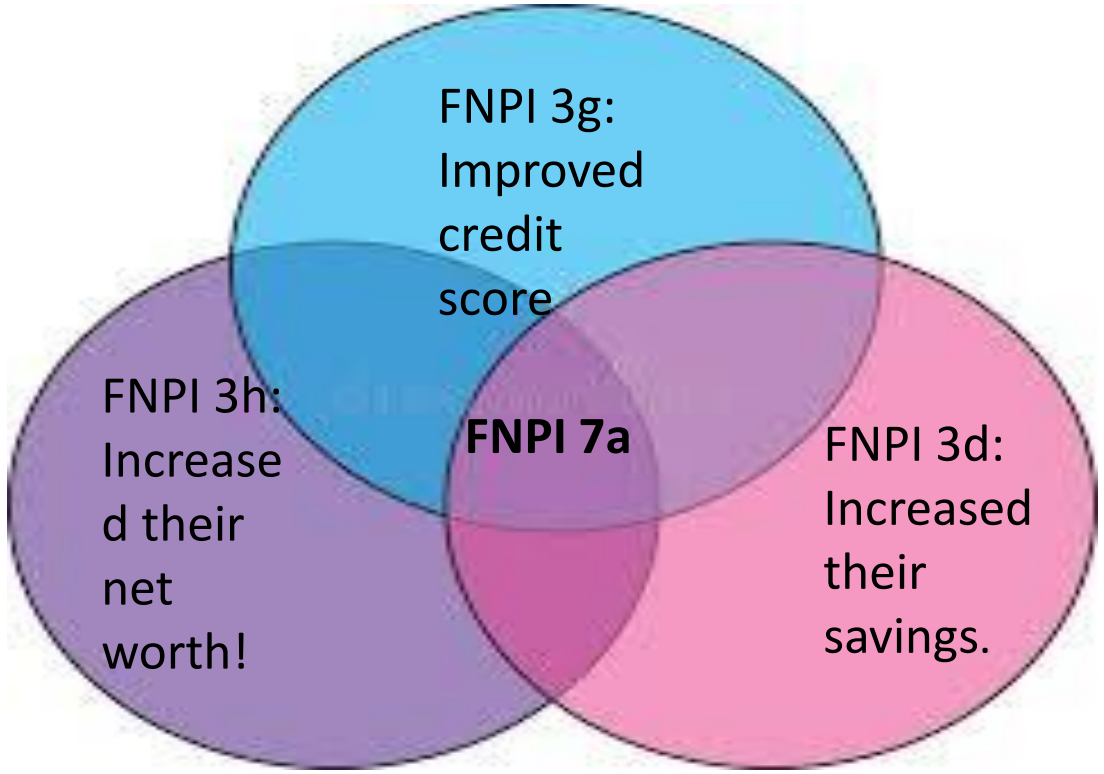
# FNPI 7a: How to Report

The participants are being reported in each FNPI **And** reported once in 7a.

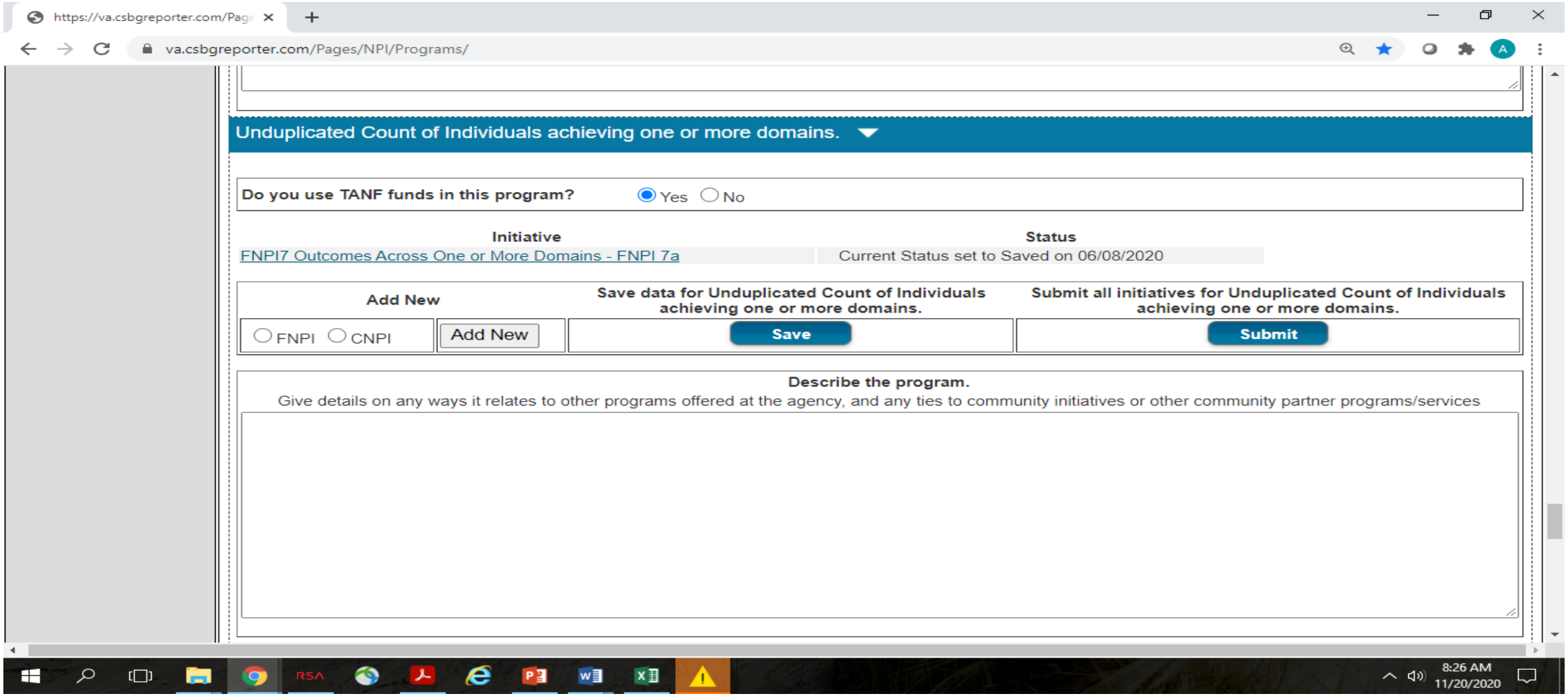
## JOHN



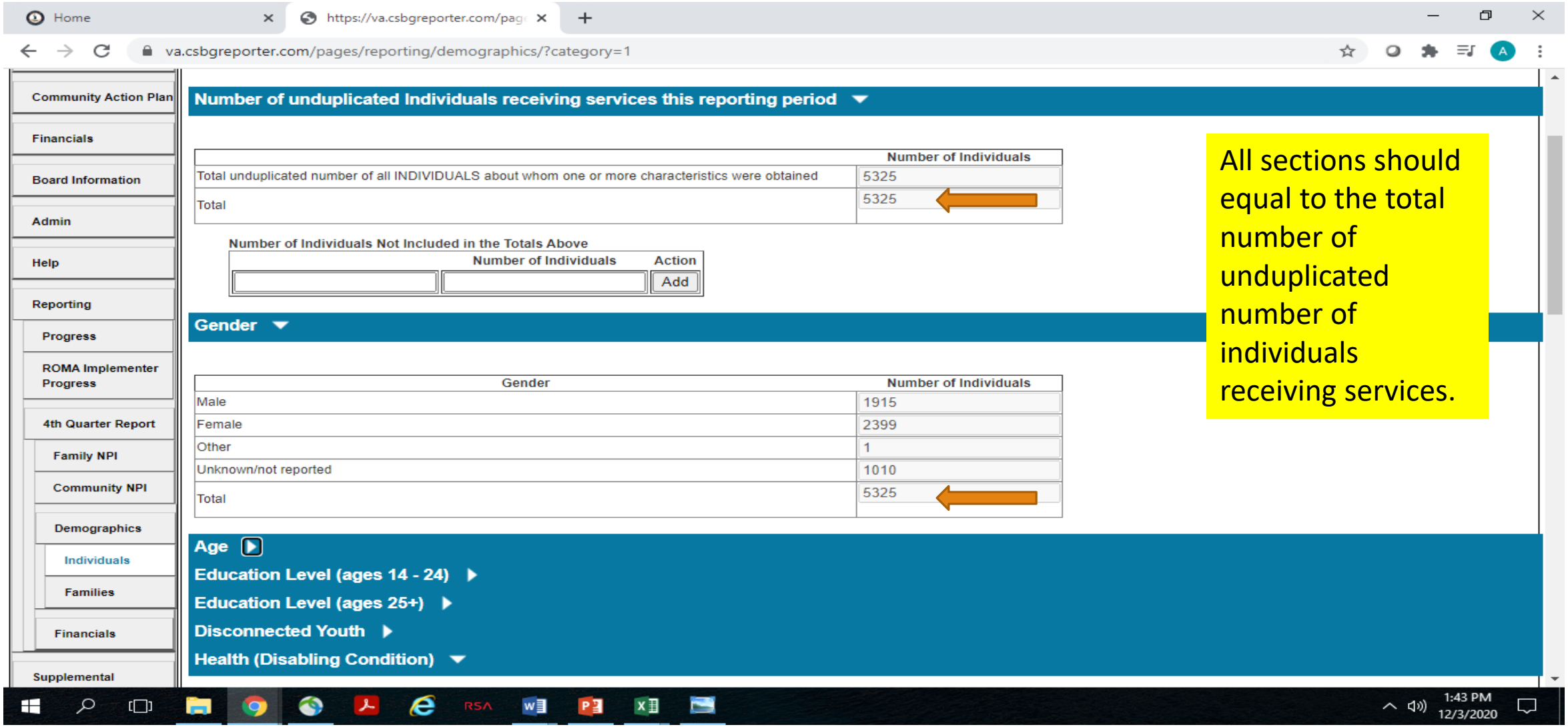

## VANESSA

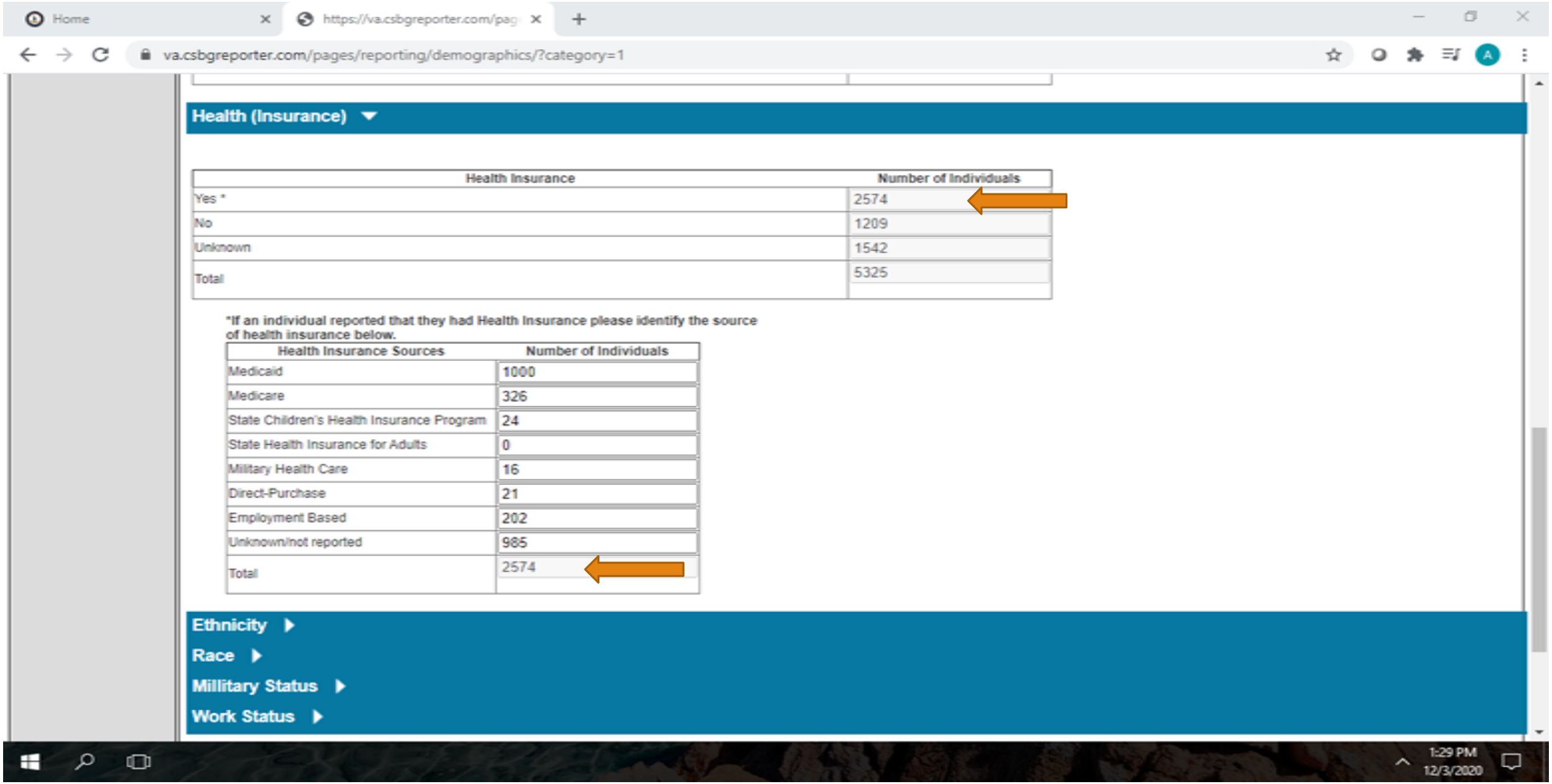


FNPI 7a. The number of individuals who achieved one or more outcomes as identified by the National Performance Indicators in various domains. Report any individual who achieves one or more outcomes across any domain in this report. This is an unduplicated count. The individual should only be counted one time.

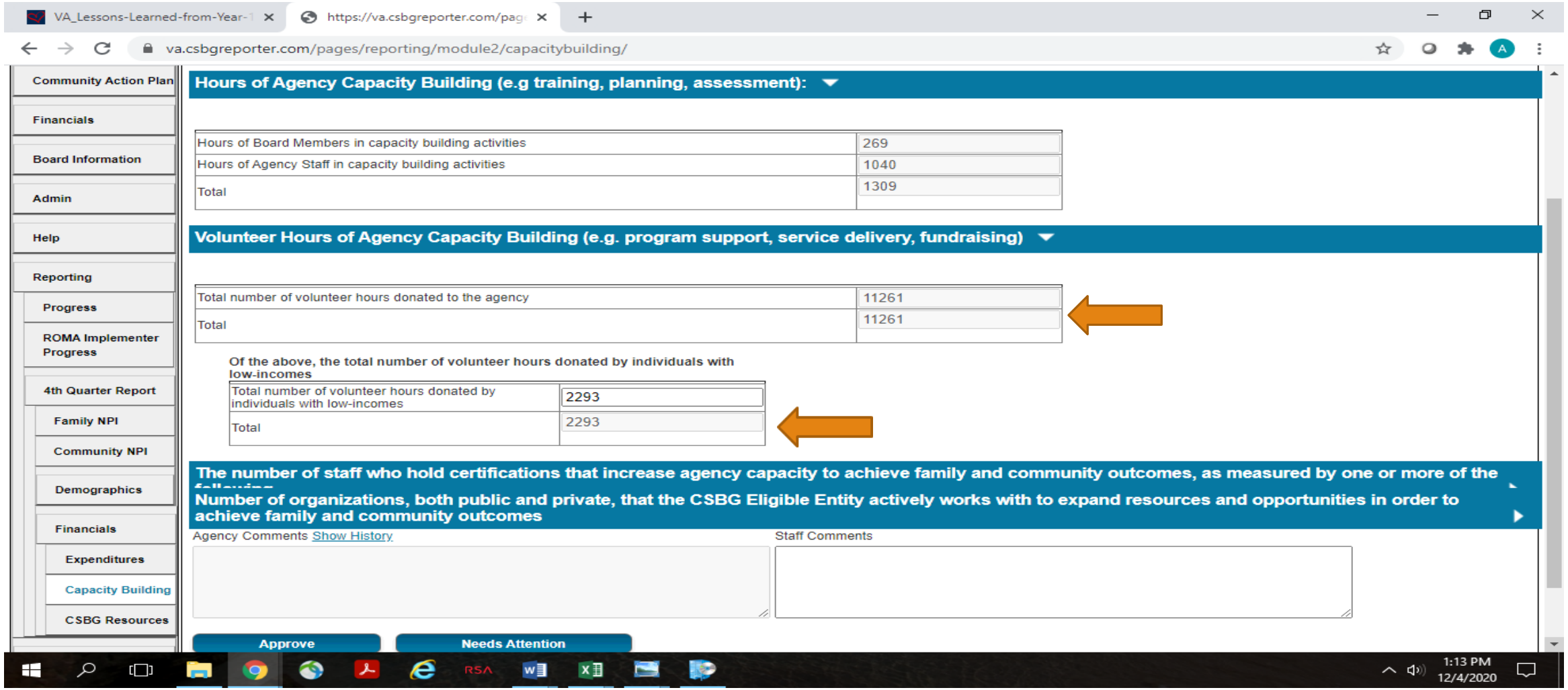


# All Characteristics -Demographics Form




Home
https://va.csbgreporter.com/pag
va.csbgreporter.com/pages/reporting/demographics/?category=1
Health (Insurance)
Health Insurance
Number of Individuals
Yes *
2574
No
1209
Unknown
1542
Total
5325
*If an individual reported that they had Health Insurance please identify the source of health insurance below.
Health Insurance Sources
Number of Individuals
Medicaid
1000
Medicare
326
State Children's Health Insurance Program
24
State Health Insurance for Adults
0
Military Health Care
16
Direct-Purchase
21
Employment Based
202
Unknown/not reported
985
Total
2574
Ethnicity
Race
Military Status
Work Status
1:29 PM
12/3/2020

# Capacity Building Volunteer Hours



# Reporting Checklist

**1. Progress**

- ❑ Review the number of participants, target, actual results, percentage outcome, and performance target for all four quarters.
- ❑ The number of people receiving a service should be reported, not the number of services provided.

**2. Family NPI's**

- ❑ Column I, the number of participants served should be completed.
- ❑ Column I should always be larger than column III, **not** the other way around.
- ❑ Make sure services listed on the Progress tab transferred to the FNPI page and are correct.
- ❑ Ensure no service total or outcome total is higher than your total number of individuals served on your demographics form. If there is a higher number, either revise your demographics form or progress report.
- ❑ If Head Start is applicable to your agency, ensure that the number of children is reported in the children's section of the demographics form.

# Reporting Checklist

**3. Community NPI's (If Applicable)**

- ❑ Make sure services listed on the Progress tab transferred to the CNPI page and are correct.
- ❑ Complete every column of the Community Initiative Status form and Service only piece.

**4. Demographics**

- ❑ Complete all sections and fields.
- ❑ Check the number of individuals that are unduplicated.
- ❑ Check each section to make sure it calculates to the number of unduplicated count of individuals served.
- ❑ All sections entered should add up to the number of unduplicated number served, **except Work Status.** That total should total the number of people over age 18.

# Reporting Checklist

**5. Financials**

Expenditures

- ❑ Ensure CSBG Expenditures Domains and agency activities checklist are completed.

- ❑ The CSBG expenditure total for July 1 through June 30 should be shown under this tab. You can confirm the total by looking at the total expended shown on your June invoice under the “Expenses” tab which is located within the “Financials” tab

Capacity Building

- ❑ Complete all four sections.

- ❑ Ensure you have accounted for all partnerships. You should at least have 1 partnership with a Statewide Membership Organization (VACAP) and one state government partnership (State CSBG Office)

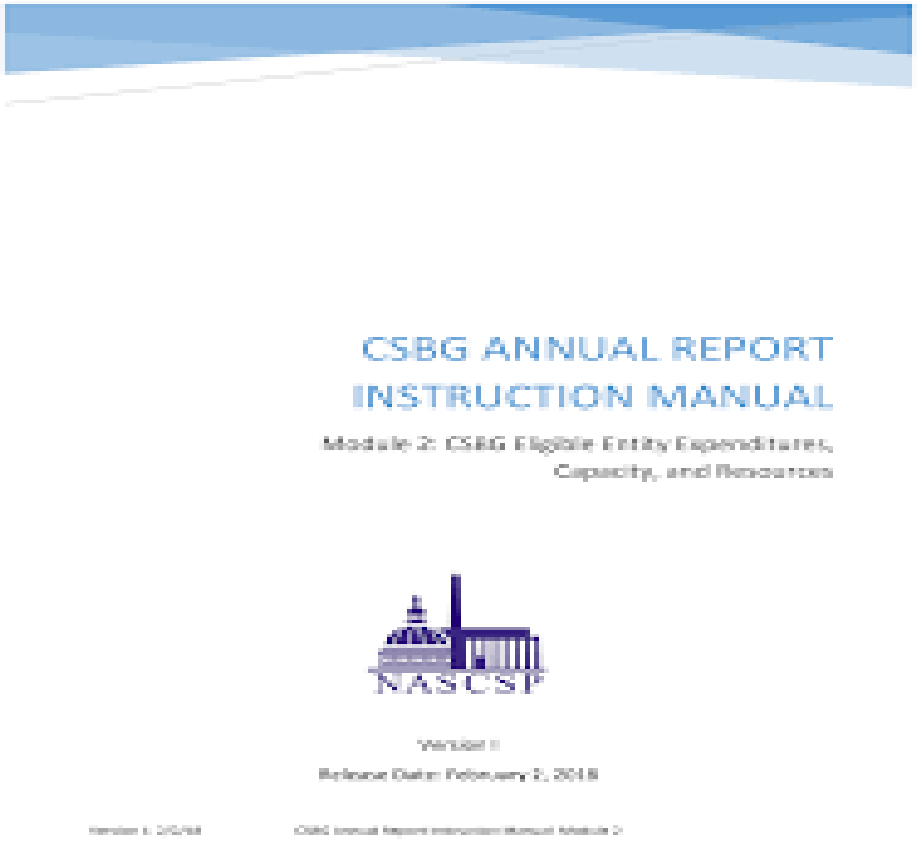
CSBG Resources

- ❑ The CSBG allocation as shown in your contract should be inserted under “Fiscal 20__ Allotment”, not your expenditures. The TANF allocation shown in your contract should be inserted under “Federal Resources Allocated (Other than CSBG).”

6. **ROMA Implementer Plan**

- ❑ Activities for all four quarters are listed and completed.

# Resources




## CSBG Annual Report

- **Module 1** – State Administration
- **Module 2** – CSBG Eligible Entity Expenditures, Capacity, and Resources
- **Module 3** – Community Level
- **Module 4** – Individual and Family Level

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# Questions

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